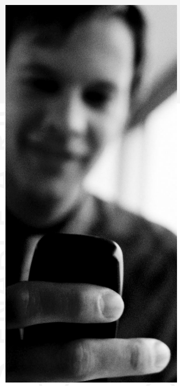
iVIEW Communications Manager (iCM)

Version 5.0



User Quick Start

IVIEW

NOTICE

For further information contact RADVISION or your local distributor or reseller.

Product version 5.0, July 2006
Publication #2
http://www.radvision.com

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5 *My Meetings*

About This Manual

The RADVISION iVIEW Communications Manager (iCM) User Quick Start describes how to use the RADVISION iView Communications Manager (iCM) application.

Related Documentation

The RADVISION documentation set is available on the Utilities and Documentation CD supplied with the product. The CD includes manuals available in PDF format and online help.

Adobe Acrobat Reader version 4.0 or later is required to open the PDF files. You can download Acrobat Reader free of charge from www.adobe.com.

1

INTRODUCING ICM TO USERS

This section provides an introduction to the iVIEW Communications Manager (iCM).

iCM is a simple-to-use, web-based application for managing and monitoring visual communication in multi-site organization deployments.

iCM can be deployed on your network to provide scheduling, monitoring and management of capacity, resources and network devices for video, audio and data meetings.

ICM USER TYPES

iCM enables you to log in as any one of the following user types

- Meeting Organizer
- Regular User

ICM PERMISSIONS

Each user type has a default set of permissions and a default view of the user interface. The following table outlines the differences between the defaults per user types.

Table 1-1 *iCM* User Types and Default Permissions

iCM Permissions	Meeting Organizer	Regular User
Check schedules	x	x
Receive and respond to meeting notices	x	x
Schedule meetings	x	

Table 1-1 *iCM* User Types and Default Permissions

Modify and delete self-scheduled meetings	x	
Modify own profile	x	x

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GETTING STARTED

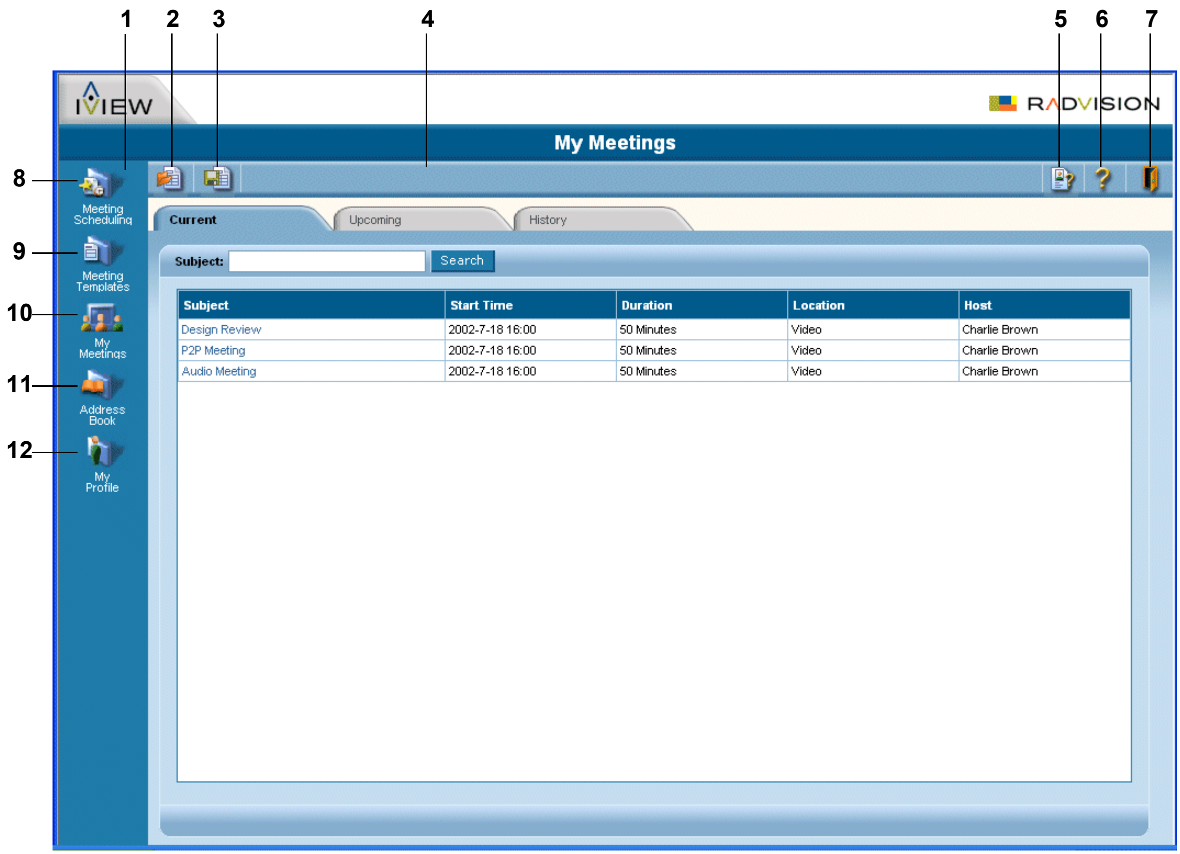
The Getting Started section includes the following topics, to help you begin using and understanding iCM

- Orientation to the iCM User-Interface
- User Workflow

ORIENTATION TO THE ICM USER-INTERFACE

The following orientation section provides a visual overview of the iCM user-interface, with reference numbers and element descriptions.

Figure 2-1 *Orientation to iCM user-interface elements*



Note In Figure 2-1, the sidebar display relates to **Meeting Organizers**. Default permissions for a **Regular User** enable only the display of **My Meetings** and **My Profile** buttons in the sidebar.

Table 2-1 Reference to user-interface elements

Table 2-2

Reference Number	Description
1	**Sidebar**–For access to screens. Buttons are displayed according to permissions for the user type assigned to you by an administrator.
2	**Load Templates button**–To access available meeting templates. For details, see Scheduling Meetings on page 7.
3	**Save Templates** button–To save a meeting as a meeting template.
4	**Top Toolbar**–Displays buttons according to your user type permissions. Options can include the **Load Templates**, **Save Templates**, **Help About**, **Online Help**, and **Logout** buttons.
5	**Help About button**–To access the **Help About** screen that includes information about the version of iCM currently installed, license information, and a link for purchase of a permanent license.
6	**Help** button–To open the online help.
7	**Logout button–T**o log out of iCM.
8	**Meeting Scheduling button–**To access the **Schedule A New Meeting** screen where you can schedule new meetings. For details, see the Scheduling Meetings chapter.
9	**Meeting Templates** button–To access the **Meeting Templates** screen where you can select or modify a meeting template. the Meeting Templates chapter.
10	**My Meetings** button–To access the **My Meetings** screen that displays your personal meeting schedule, including all currently running video and audio meetings, as well as records of upcoming and past meetings. For details, see My Meetings on page 25.
11	**Address Book** button–To access the Address Book screen that lists your personal and public contacts, and enables you to add new personal contacts. For details, see Address Book on page 55.
12	**My Profile** button–To access the **My Profile** screen that includes security credentials, service access, default time zone and terminal settings in your profile. For details, see the My Profile chapter

User Workflow

The basic iCM user workflow involves the following procedures

- Logging in
- Scheduling a meeting
  - Defining meeting settings
  - Inviting participants
  - Inviting guests
  - Inviting terminals
  - Defining display layout
- Monitoring a meeting
- Controlling a meeting
  - Extending a meeting
  - Inviting additional participants
  - Changing the display layout
  - Terminating a meeting
- Generating a report
- Logging out

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SCHEDULING MEETINGS

This section describes how to schedule a meeting by defining the time of the meeting, inviting participants, and defining participant settings.

You can schedule a new meeting by configuring the fields in the **Meeting Scheduling** screens or by loading an existing meeting template.

ACCESSING MEETING SCHEDULING

Procedure

- On the sidebar, in the **User** section, click the **Meeting Scheduling** button.

  The **Schedule a New Meeting** section contains the following tabs

Table 3-1 Schedule a New Meeting tabs

Tab Name	Description
Meeting	Displays meeting information, such as the meeting type, and the date and time of the meeting.
Invite	Displays a list of available participants and a list of selected participants.
Attendees Settings	Displays the settings for meeting participants.

Table 3-1 Schedule a New Meeting tabs

Tab Name	Description
Attendee Availability	Displays a calendar with the availability of selected attendees.
Advanced	Displays advanced options for meeting templates.

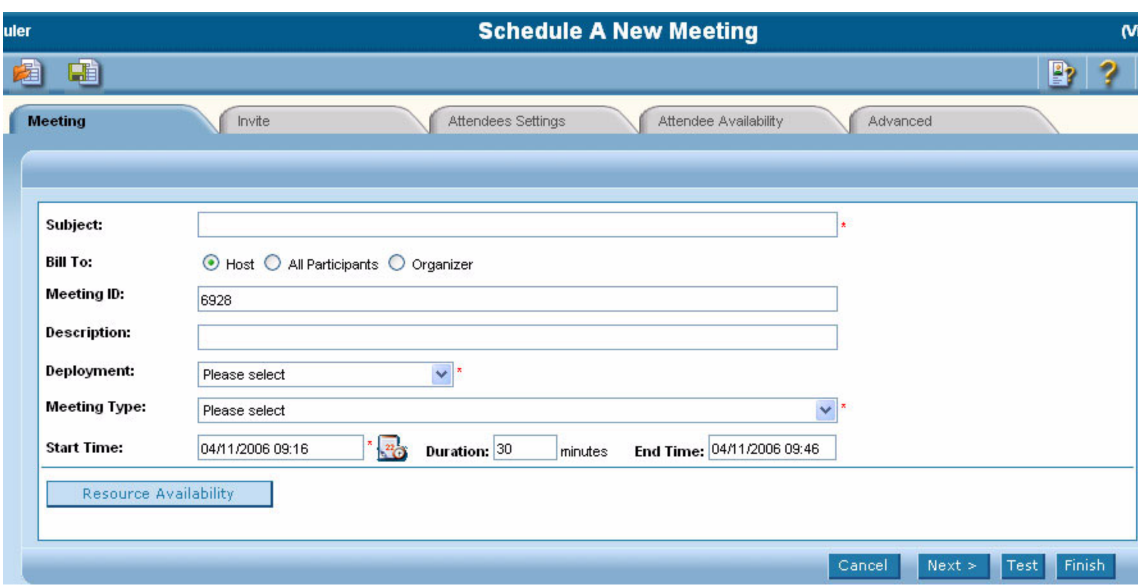
USING THE MEETING TAB

On the **Meeting** tab, you name and define the new meeting.

1 In the **User** sidebar, click **Meeting Scheduling** section.

The **Schedule a New Meeting** screen opens on the **Meeting** tab by default.

Figure 3-1 Meeting Scheduling: Meeting tab



2 In the **Subject** field, enter a meeting subject.

3 In the **Bill To** field, select **Host**, **All Participants**, or **Organizer**. The cost of the meeting is billed accordingly.

4. If required, edit the meeting ID that appears automatically in the **Meeting ID** field. If you do not provide a meeting ID, a random meeting ID is generated.

Note **Meeting ID** can appear on either the **Meeting** tab or on the **Advanced** tab.

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5. In the **Description** field, enter a description of the meeting for future reference.
6. From the **Deployment** list, select a deployment. The name of the deployment appears in the screen title for all tabs. For example, **Scheduling a New Meeting(SBU)**.
7. From the **Meeting Type** list, select a meeting type.

Note A default meeting type can be set in **Admin|Advanced Settings** section.

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8. If **One Button** is selected from the **Meeting Scheduling button** list on the **Look and Feel** tab, then on the **Meeting** tab, the default start time is **Now**.

   To change the **Now** default start time, by the **Start Time** field, click the **select a start time** button. The **Date Select** window opens in which you can select a start date and precise start time for the meeting. If you want to reset the meeting to start immediately, in the **Date Select** window, click the **Now** button. After making your selections, click **OK**.
9. To reset the default meeting-duration that appears in the **Duration** field (determined in the **Admin|Advanced Settings**, on the **Default User Settings** tab), enter the length of time you want the meeting to be.

   In the **End Time** field, the precise time for the end of the meeting appears based on the start time and meeting duration.

10 If **One Button** is selected from the **Meeting Scheduling** button list on the **Look and Feel** tab, then a regular meeting is listed by default on the **Meeting** tab.

To make the meeting a recurring meeting, click the **Recurrence** button. In the **Recurrence Pattern** window that opens, in define the recurrence details for the meeting.

Note To check resource availability, click the **Resource Availability** button. If there is a resource issue, a message appears. Click the **Back** button to return to the **Meeting** tab.

If all required resources are available, the meeting is automatically scheduled and notifications are sent to all participants.

If network resources are available but non-required resources are not, the meeting is automatically scheduled, notifications are sent, and a conflict list is created for the meeting organizer.

Note The format in which iCM sends e-mail notifications depends on the type of meeting creator. If the meeting creator is a web user, the e-mail notification is in HTML format. If the meeting creator is an Outlook user, the e-mail notification is in VCAL format.

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11 To test the settings, click the **Test** button.

A message appears detailing the test results. If the test fails, you must adjust the meeting settings.

12 To proceed with scheduling, click the **Next** button.

The **Invite** tab opens.

13 To apply the settings and exit the tab, click **Finish**. If settings cannot be applied a message appears. In the message screen,

alternative time slots are suggested for rescheduling of the meeting. Click the **Back** button to return to the **Meeting** tab.

Note If **Non Video Conference** is selected, only participating users and meeting rooms appear in the list.

Using the Invite Tab

On the **Invite** tab, you designate required meeting participants.

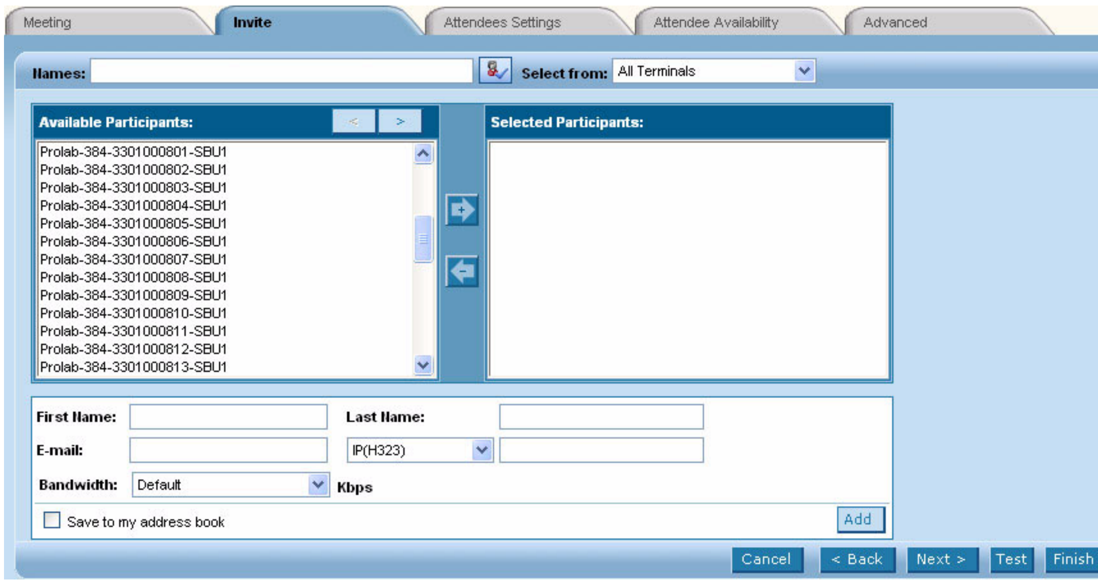
☞ **Procedure**

1 In the **User|Meeting Scheduling** section, click the **Invite** tab.

Note To open the **Invite** tab directly, you must complete required fields and selections on the previous tab in **Meeting Scheduling**.

Note You can also access the **Invite** tab by clicking **Next** on the **Meeting** tab.

Figure 3-2 *Meeting Scheduling: Invite tab*



2 To search for person or terminal to invite to the meeting, in the **Names** field, enter a name.

3 To select the source from which to search for resources or participants, from the **Select From** list, select **Organization Groups**, **Address Book**, or **All Terminals**.

4 To move from page to page in the list of **Available Participants**, use the arrow buttons at the top-right side of the **Available Participants** section.

5 To move participants to or from **Available Participants** and **Selected Participants**, use the arrow buttons between the two sections.

6 To add participants not included in the **Available Participant**s list, in the lower section of the **Invite** tab, enter the required information about the participant, and then click **Add**.

The name of the participant appears in the **Selected Participants** list.

7 To add a participant to the **Address Book**, check **Save to my address book** check box.

8. To test the settings, click the **Test** button.

   A message appears detailing the test results. If the test fails, you must adjust the meeting settings.

9. To proceed with scheduling, click the **Next** button.

   The **Attendee Settings** tab opens.

10. To apply the settings and exit the tab, click **Finish**. If settings cannot be applied a message appears. In the message screen, alternative time slots are suggested for rescheduling of the meeting. Click the **Back** button to return to the **Invite** tab.

Note If **Non Video Conference** is selected from the **Select from** list, **All Rooms** is displayed instead of **All Terminals**.

Using the Attendees Settings tab

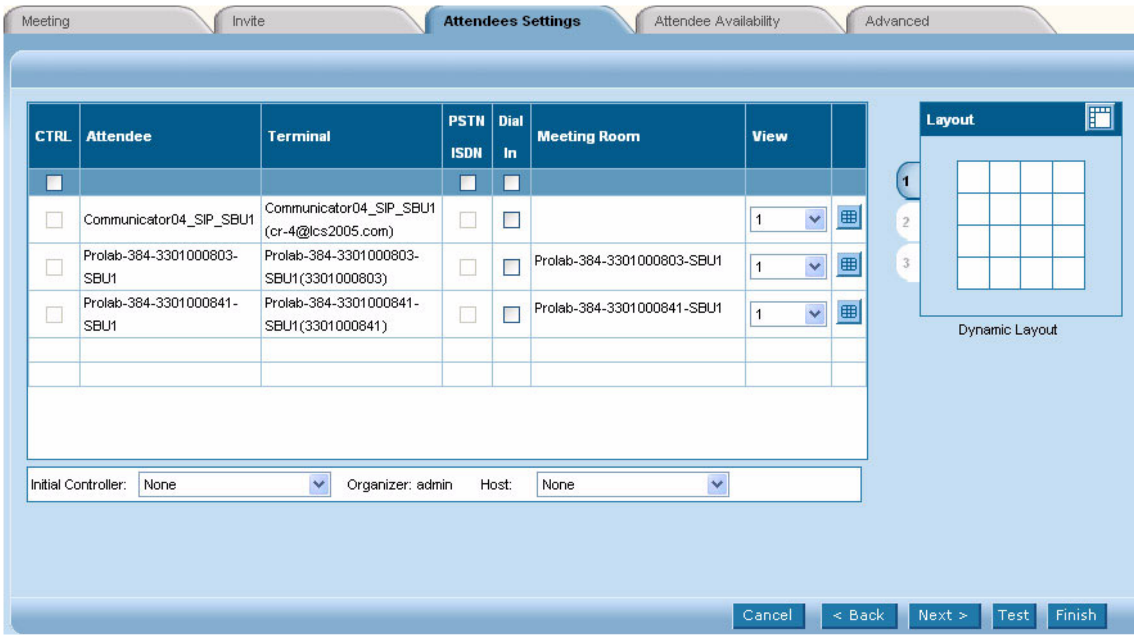
On the **Attendees Settings** tab, you set settings for each meeting participant.

☞ **Procedure**

1. In the **Meeting Scheduling** section, click the **Attendees Settings** tab.

Note To open the **Attendees Settings** tab directly, you must complete required fields and selections on previous tabs in **Meeting Scheduling**.

Figure 3-3 *Meeting Scheduling: Attendee Settings tab*



2 To grant control privileges to an individual attendee, check the **CTRL** check box. To grant control privileges to all attendees, click the top **CTRL** check box.

If the **CTRL** check box is not checked, only the Administrator and Meeting Operators have in-meeting control rights.

3 To assign or change the assignment of a terminal for a participant without an assigned terminal, click **Select**.

In the **Select Terminal** window that opens, select a terminal from the list or add an external number. To add an external number, click **Specify custom terminal**, enter the required terminal name, and then click **OK**.

Tip You can modify a terminal number in the **Select Terminal** window.

4 If a terminal is a Dual IP/ISDN terminal and is designated as an ISDN connection for the meeting, check the **Dual IP/ISDN** check box.

5. If a terminal is expected to be dial-in, select the **Dial-in** check box for terminal.
6. If a terminal is a mobile unit, and you want to change the meeting room for the terminal, from the list of alternative meeting rooms, select a meeting room for the terminal.
7. From the **View** list, select a layout for each terminal. You can view available layouts in the **Layouts** display by clicking on the numbered side-tabs. If you want to see the view that is currently assigned to the terminal, click the **Layout** button at the top-right of the **Layouts** display. The views that are available are dependant on the service selected for the meeting.
8. To include a terminal name in the terminal meeting display at the start of a meeting, drag and drop the **Change Layout** icon (located to the right of the **View** column for each terminal) onto the **Layouts** display. The terminal name appears in the **Layouts** display.
9. From the **Initial Controller** list, select a participant as the meeting controller.
10. From the **Host** list, select a host for the meeting.
11. To add a participant to the **Address Book**, check **Save to my address book** check box.
12. To test the settings, click the **Test** button.

    A message appears detailing the test results. If the test fails, you must adjust the meeting settings.
13. To proceed with scheduling, click the **Next** button.

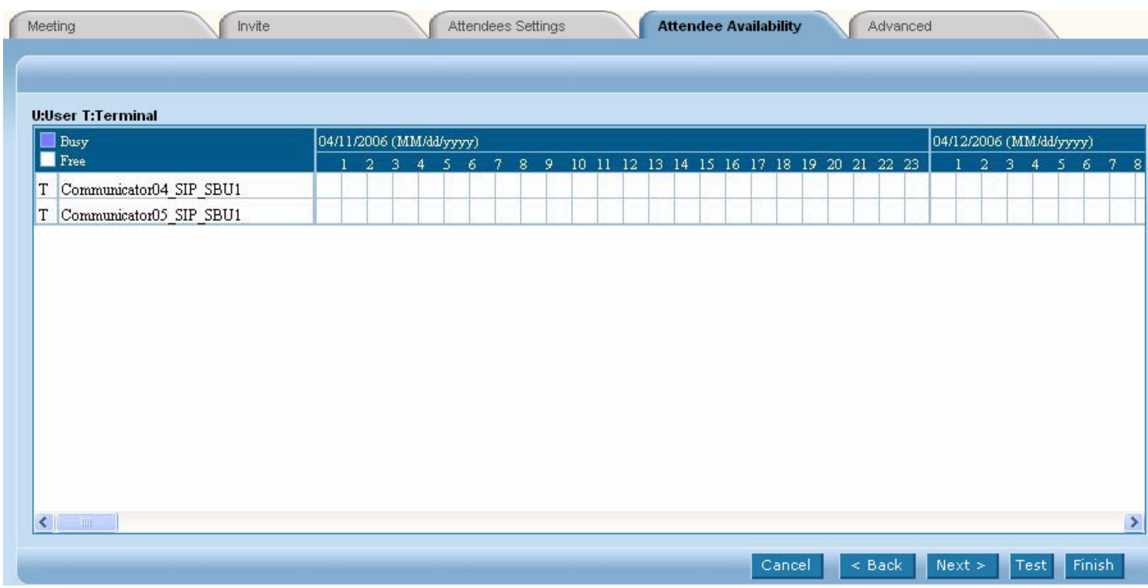
    The **Attendee Availability** tab opens.
14. To apply the settings and exit the tab, click **Finish**. If settings cannot be applied a message appears. In the message screen, alternative time slots are suggested for rescheduling of the meeting. Click the **Back** button to return to the **Attendee Setting** tab.

Using the Attendee Availability Tab

On the **Attendee Availability** tab, you can monitor user (attendee) and terminal availability, and in the case of Non Video Conference, room availability. The legend at the top left of the screen explains that **T** means "Terminal" and that **U** means "User". In the case of a Non Video Conference, **R** means "Room". Also, that purple represents "Busy" and white represents "Free". A four week time-period is displayed, beginning from the week that the meeting is scheduled to occur. The information on the **Attendee Availability** tab is read-only.

Note To open the **Attendees** tab directly, you must complete required fields and selections on previous tabs in **Meeting Scheduling**.

Figure 3-4 *Meeting Scheduling: Attendee Availability tab*



Using the Advanced Tab

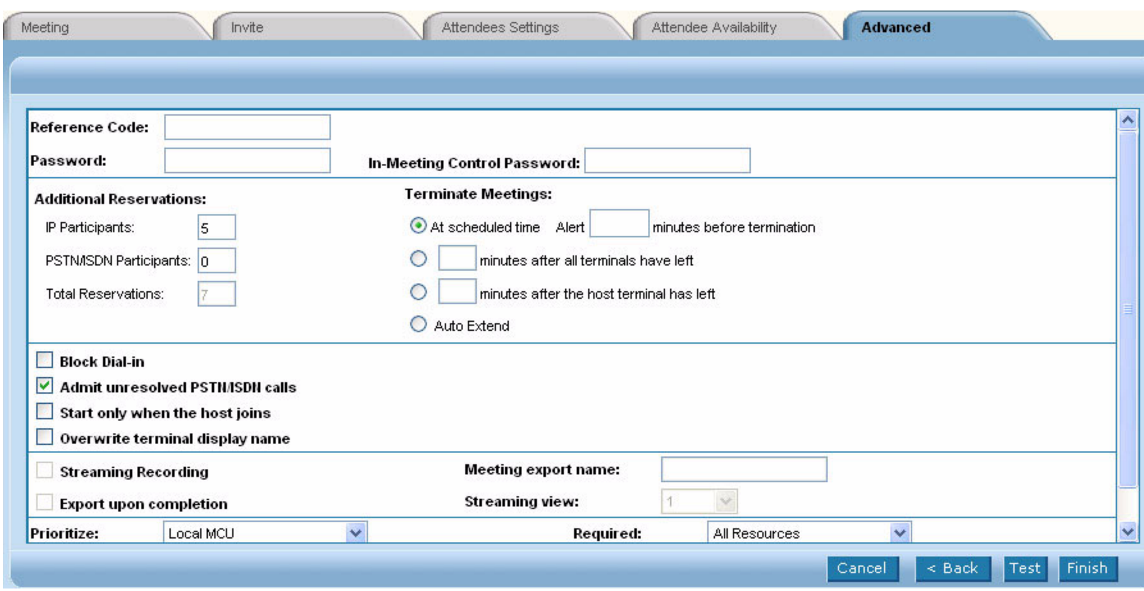
On the **Advanced** tab, you can select from advanced meeting options. Defaults for all settings on the **Advanced** tab are set in **Admin|Advanced Settings**, on the **Default Meeting Settings** tab.

Procedure

1 In the **Meeting Scheduling** section, click the **Attendees Settings** tab.

Note To open the **Advanced** tab directly, you must complete required fields and selections on previous tabs in **Meeting Scheduling**.

Figure 3-5 Meeting Scheduling: Advanced tab



2 In the **Reference Code** field, enter a reference code for the specified meeting. This code is used to identify the meeting for billing purposes.

3 For password protection for the meeting, in the **Password** field, enter a password. All dial-in participants in the meeting must use this password.

4 For password protection for in-meeting control, in the **In-Meeting Control,** in the **Password** field, enter a password. The participant assigned in-meeting control privileges must use this password.

5 If you may require additional resources for the meeting, in the **Additional Reservations** section, enter the number of IP and ISDN participant reservations to be made when the meeting is scheduled.

In **Total Reservations**, the total number of reservations is displayed.

Note If you do not reserve resources for an additional participant, if resources are available, the participant may be able to join "on-the-fly".

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6 In the **Terminate Meetings** section, check the following options according to your requirements

- **At scheduled time**—To terminate the meeting according to the termination time selected on the **Meetings** tab.
  - **Alert** *n* **minutes before termination–**Enter a value in minutes. The warning is received by terminals in the meeting.
- *n* **minutes after all terminals have left**—Enter a value in minutes. The meeting terminates this amount of time after the last terminal leaves the meeting.
- *n* **minutes after the host terminal has left**—Enter a time in minutes. The meeting terminates this amount after the host terminal leaves the meeting.
- **Auto Extend**—The meeting continues until it is manually ended via the in-meeting control panel or until all terminals exit the session, whichever occurs first.

7 To prevent dial-in terminals from connecting to the meeting, check the **Block Dial-in** check box.

8 To admit uninvited PSTN/ISDN calls to the meeting, check the **Admit unresolved PSTN/ISDN terminals** check box. PSTN/ISDN terminals can dial into the meeting as long as

there are available resources. If a PSTN or ISDN terminal is not on the invited list when the meeting was initially scheduled, it is referred to as an unresolved terminal. Unresolved terminals are not allowed to dial into a meeting if the check box is unchecked but iCM can still dial out to any resolved PSTN/ISDN terminals.

9. If you do not want the meeting to begin without the host, select the **Start only when host joins** check box.
10. To override the setting for the terminal name to be included in video display at the start of a meeting, check **Overwrite terminal display name**. Unchecked by default.

Note The original setting for the display of the terminal name is located in **Admin|Advanced Settings|Default Meeting Settings.**

Note The terminal name remains displayed in the user interface of the meeting.

Note The **Overwrite terminal display name** feature is supported by RADVISION MCU 3.6 and later only.

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11. From the **Prioritize** list, select the priority by which meetings are scheduled and which is used in meeting templates by default. This is an important factor in creating efficient conferences. The options are
    - **Local MCU**–A local MCU is selected to save communications costs and save time due to reduced distance of routed calls. This mode also supports dynamic cascading of a live conference.
    - **Bandwidth**–iCM allocates resources to conserve bandwidth. In some cases, this may cause a meeting to be cascaded to conserve bandwidth, even though a single MCU is available which can host the meeting.
    - **Delay**–iCM allocates resources that ensure the best quality for the meeting.

12 From the **Required** list, select the default resources required for the meeting to be confirmed. A meeting is not allowed if these resources are not available at the time of the meeting. If you select **None**, iCM confirms available network resources and then reports any availability issues regarding attendees, rooms, or terminals.

13 If you want to change the **Default Time Zone** for the meeting, select a time zone from the list.

4

MEETING TEMPLATES

This section describes how to define and use a meeting template. It includes the following topics

- Overview of Meeting Templates
- Searching for a Meeting Template
- Adding a Meeting Template
- Modifying a Meeting Template
- Deleting Meeting Templates

OVERVIEW OF MEETING TEMPLATES

In a meeting template, you can select meeting types and attendee settings, and then use the template with its settings for different meetings or recurring meetings.All settings appear in the relevant fields when you select the template. You can modify template settings when you schedule a meeting, if required.

ACCESSING MEETING TEMPLATES

☞ **Procedure**

◎ On the sidebar, in the **User** section, click the **Meeting Templates** button.

The **Meeting Templates** screen displays a list of all of your meetings currently in progress, including the following information

- **Name**—Displays the name of the template.

Note To sort the **Name** column, click the column heading.

- **Meeting Types**—Displays the meeting types configured in this template for an audio or audio/video meeting.
- **Location**—Displays the location of the meeting.

Searching for a Meeting Template

You can search the list of existing templates for a specific meeting template.

Procedure

1. In the **Name** field, enter the full or partial name of a meeting template.
2. Click **Search**.

   Search results are listed, including the name of the meeting template and the meeting type.

Adding a Meeting Template

When you create a new meeting template, you add it to the list of available meeting templates in the **Meeting Scheduling** section.

Procedure

1. In the **Meeting Templates** section, click **Add**.

   The following tabs appear

   - **Meeting**
   - **Invite**
   - **Attendees Settings**

- **Advanced**

Note These tabs are the same as those in the **Meeting Scheduling** section and are used in the same way. For details, see the Scheduling Meetings chapter.

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2. When you completed the required selections on the tabs, click **Finish**.

   The new template is saved.

Modifying a Meeting Template

You can modify a meeting template and then save it under the same name or a different name.

Procedure

1. In the **Name** column of the **Meeting Templates** section, click the name of the template you want to modify. The **Modify Template** section displays.
2. Modify the tabs and fields, as required. For information on the tabs and fields, refer to the Scheduling Meetings chapter.
3. Click **Finish**.

Deleting Meeting Templates

You can delete meeting templates that you create.

Procedure

1. In **Meeting Templates** screen, in the **Name** column, click the check box next to the template you want to delete.
2. Click the **Delete** button.

   The meeting template is deleted from the **Meeting Templates** list, and no longer appears in lists of available meeting templates.

5

MY MEETINGS

MY MEETINGS OVERVIEW

This section describes how to use the **My Meeting** screens.

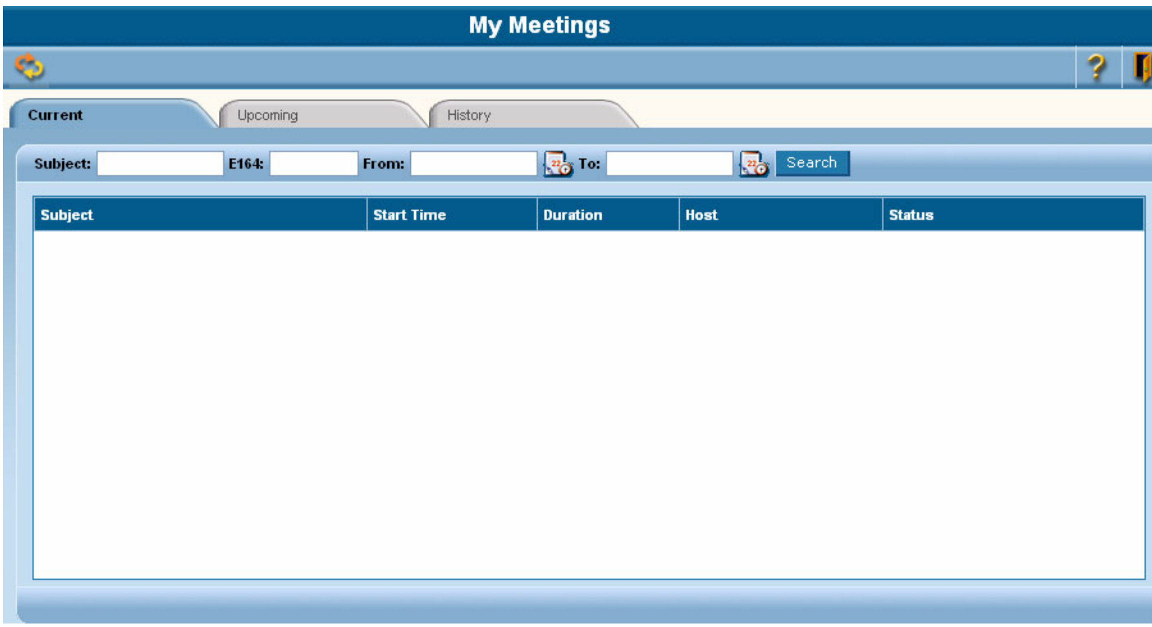
The **My Meetings** section displays your personal meeting schedule. It includes information about scheduled meetings in the past, present and future. If you have in-meeting control privileges, you can take control of a meeting in the **My Meetings** section. The **My Meetings** section includes the following tabs

- **Current**—Lists all meetings currently in progress for a specified user or organization.
- **Upcoming**—Lists all upcoming meetings for the entire organization.
- **History**—Lists all past meetings for the entire organization.

USING THE CURRENT TAB

On the **Current** tab, you can view all meetings of a specified user or organization that are currently in progress. You can also search for meetings.

Figure 5-1 *My Meetings: Current tab*



A list of all meetings that are currently in progress is displayed. Information about each meeting is included under the following column headings

- **Subject field**—Subject of the meeting. To sort by subject, click column heading. To monitor a meeting, in the Subject column click the meeting subject. For details, see Monitoring a Meeting **on page 28**.
- **Deployment**—Deployment in which the meeting is scheduled.
- **Start Time**—Meeting date and start time. To sort by start time, click column heading.
- **Duration**—Length of the meeting, in minutes. To sort by meeting duration, click column heading.
- **Host**—Name of the designated host of the meeting. To sort by host name, click column heading. For details about selecting a meeting host, see Using the Attendees Settings tab on page 13.

- **Status**—Meeting creation status. To sort by failure status, click column heading.
  - Green status indicates successful meeting creation and all participant successfully in meeting.
  - Red status indicates unsuccessful meeting creation or the abnormal exiting of a terminal from the meeting. To view the **Reason Failed** error message, click the red status indicator, and then click **Retry** to resend the meeting information to the MCU.

Note If a terminal is disconnected correctly via iCM in-meeting control, there is no red status indicator. For details, see Terminating a Meeting on page 37.

  - No status indicator indicates that there are no designated meeting participants or terminals.

Searching For a Meeting

On the **Current** tab, you can search for a scheduled meeting.

Procedure

1. In the **Subject** field, enter the subject or partial subject of the meeting for which you are searching.
2. **In the E164 field,** enter an E164 number for an IP terminal. Any participating IP terminal with that number is listed in the search results.
3. By the **From** field**,** click the Calendar button and in the screen that opens, select the start date from which meeting information is searched.
4. By the **To** field**,** click the Calendar button and then in the screen that opens, select a finish date up to which meeting information is searched.
5. Click **Search**.

   Search results are listed.

Monitoring a Meeting

You can monitor any of your current meetings. If you have been granted in-meeting control privileges, you can take control of the meeting, as described in Controlling a Meeting on page 32.

Procedure

- On the **Current** tab, click the subject of the meeting you want to monitor.

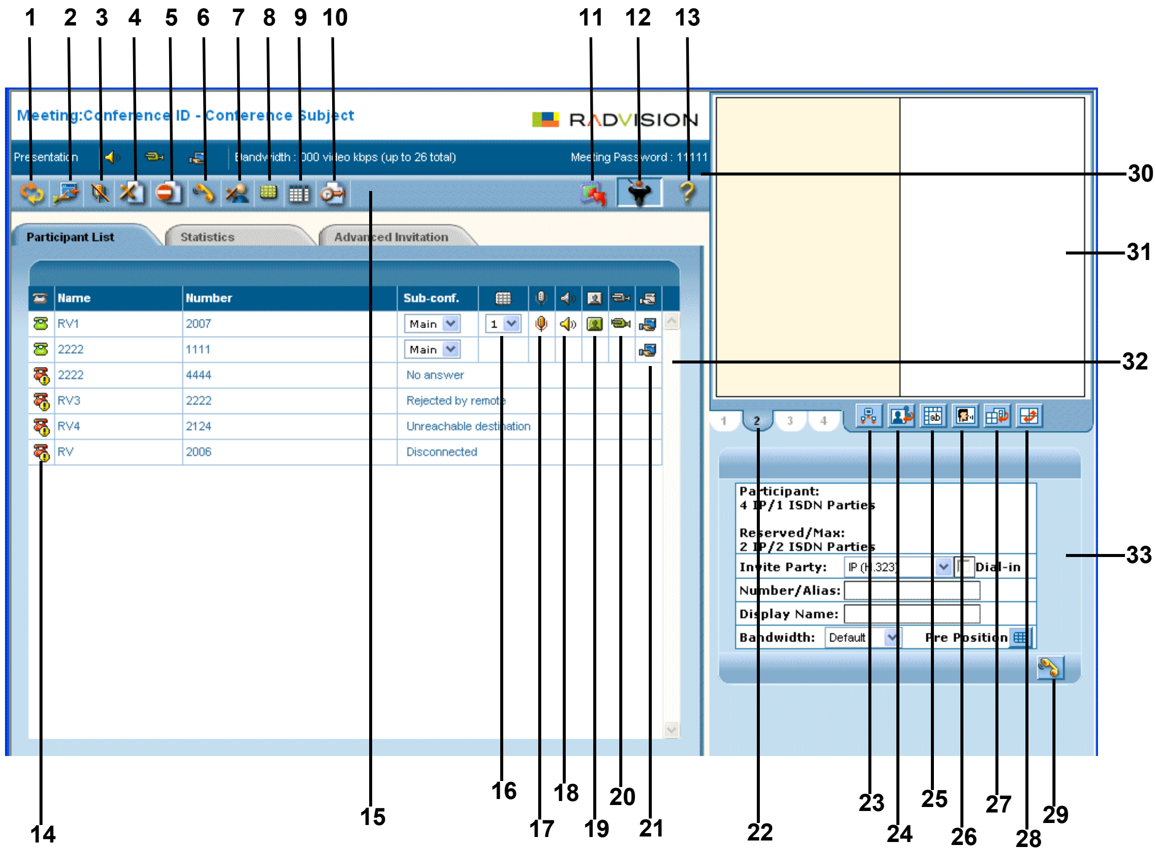
  The **Meeting: Conference ID - Conference Subject** screen appears.

Note All options in the **Meeting: Conference ID - Conference Subject** screen are active if you have chair-control privileges.

The **Meeting: Conference ID - Conference Subject** screen contains the following tabs

- **Participant List**—Enables you to view a list of meeting participants and available display layouts.
- **Statistics**—For user with chair-control privileges, to view general media traffic statistics related to the meeting.
- **Advanced Invitation**—For user with chair-control privileges, to invite multiple participants to the meeting simultaneously.

Figure 5-2 *Orientation to the Meeting:Conference ID - Conference Subject screen*



Note If you have chair-control privileges, all options in the **Meeting: Conference ID - Conference Subject** screen are displayed.

Table 5-1 Reference for Meeting:Conference ID - Conference Subject screen

Reference Number	Description
1	**Refresh** button—Active with chair-control permission. You can refresh the meeting status at any time.
2	**Join Data Collaboration** button—Active with chair-control permission. You can enable data collaboration between participants that support T.120 data sharing. **Note** If the meeting organizer or administrator checks the **Start only when the host joins** check box in the **Meeting Scheduling** section, on the **Advanced** tab, then the **Join Data Collaboration** button is not available.
3	**Mute/Enable All** button—Active with chair-control permission. ■ If you want to mute all participants, from the list select **Mute All**. ■ If you want audio enabled for all participants, from the list select **Enable All**. **Note** If you want to mute or enable audio for a specific participant, on the **Participant** tab, in the **Control Panel** area, click the **Mic. Enabled** button.
4	**Terminate Meeting** button
5	**Block Entry** button—Active with chair-control permission. To block a participant from entering a current meeting.
6	**Reconnect All** button
7	**Delete Participant** button—Active with chair-control permission. You can disconnect a participant and delete the participant from the **Participant List**. **Note** Before using the **Delete Participant** button, on the **Participant List** tab, select the participant you want to disconnect and remove from the list.
8	**Change view to all participants** button

Table 5-1 Reference for Meeting:Conference ID - Conference Subject screen

Reference Number	Description
9	**Sub Conference** button
10	**Extend Conference Duration** button
11	**Start Meeting** button—Active with chair-control permission. **Note** The meeting starts when the host joins the meeting, if the meeting organizer or administrator checks the **Start only when the host joins** check box in the **Meeting Scheduling** section, on the **Advanced** tab.
12	**Take Control** button—Active with chair-control permission. To activate the control panel, on the toolbar click the **Take Control** button. When chair-control of the meeting is established, additional options appear in the user-interface.
13	**Help** button
14	**Connection Status** icon
15	**Toolbar**
16	**Location in View** icon
17	**Mic. Enabled** icon
18	**Loudspeaker Enabled** icon
19	**Monitor Enabled** icon
20	**Camera Enabled** icon
21	**Data Collaboration Enabled** icon
22	**Video Layout** tab
23	**Output Scheme Settings** button
24	**Auto-switch** button
25	**Display Participant Name in Frame** button

Table 5-1 Reference for Meeting:Conference ID - Conference Subject screen

Reference Number	Description
26	**Active Speaker** button
27	**Dynamic Layout** button
28	**Change Layout** button
29	**Invite** button
30	**General Meeting Display and Control** area—Displays general information about a current meeting. For example, available media types, bandwidth, and meeting password. The toolbar contains controls as described in Controlling a Meeting on page 32.
31	**Video Display** area—For adjustment of settings related to video and display, while a meeting is in progress. For details, see Defining Video Layout and Display on page 37.
32	**Control Panel**—Includes tabs to access list of participants and terminals in a meeting, as well as general status information.
33	**Video Layout** area—Current video layout. For adjustment of settings related to video layout, while a meeting is in progress. For details, see Defining Video Layout and Display on page 37.

Controlling a Meeting

If you have in-meeting control privileges, you can chair a meeting and you have permissions that include performance of the following types of tasks

- Monitoring the entrance of a participant into the meeting
- Re-invitation of a participant who has not connected
- Muting of a participant generating background noise
- Blocking of a participant from connecting to a meeting

Note Only one person is allowed chair-control of a meeting at any given time.

☞ **Procedure**

1. On the **Current** tab, click the subject of the meeting you want to control.

   The **Meeting: Conference ID - Conference Subject** screen appears.

Note To access the **Meeting: Conference ID - Conference Subject** screen, you can also click the link in the e-mail notification for the meeting.

2. To activate the control panel, on the toolbar, click the **Take Control** button.

   When your chair-control of the meeting is established, additional options appear in the user-interface.

Note If the Meeting Organizer selects the **Start only when the host joins** option, the **Take Control** button is unavailable until the host joins the meeting, and the meeting starts.

Disconnecting a Participant

You can disconnect a participant and delete the participant from the **Participant List**.

Procedure

1. On the **Participant List** tab, select the participant you want to disconnect and remove from the list.
2. Click the **Delete Participant** button on the toolbar.

   The participant is disconnected from the meeting, and removed from the list.

Reconnecting a Disconnected Participant

You can reconnect a participants that is disconnected from a meeting.

Procedure

- To reconnect a disconnected participant, on the **Participants List** tab, in the **Status** column, click the red status indicator for the disconnected participant.

  The participant is reconnected.

Reconnecting All Participants

You can reconnect all participants to a meeting.

Procedure

- On the toolbar, click the **Reconnect All** button.

  All participants are reconnected to the current meeting.

Changing the Meeting View for a Participant

While a meeting is in progress, you can change the meeting view for a single selected participant or for all participants simultaneously.

☞ **Procedure**

1. On the **Participant List** tab, select the participant for whom you want to change the view.

Note If you do not select a participant, the view changes for all participants.

2. On the toolbar, click the **Change view to all participants** button.

   The **Change participants view** screen appears.
3. From the **Change to view** list, select a view for the participant.
4. Click **OK**.

Inviting a Sub-Conference

You can divert selected participants in the **Participants List** of the current conference to attend a new or currently running private audio sub-conference. Sub-conference participants are hidden in the video layout.

☞ **Procedure**

1. In the **Participant List** tab, select the participant(s) whom you wish to invite to a sub-conference.
2. Click the **Sub-conference** button on the toolbar.

   The **Select sub-conference** screen appears.
3. From the list, select a sub-conference you want to which you want to invite participants.

4 Click **OK**.

Note A maximum of three sub-conferences can be supported per meeting. The number of supported sub-conferences depends on the meeting-type configuration.

Extending Meeting Duration

You can extend the meeting duration while a meeting is in progress.

☞ **Procedure**

1. Click the **Extend Conference Duration** button on the toolbar. The **Extend** screen appears.
2. In the **Extend** field, enter the number of minutes by which you want to extend the duration of the meeting.
3. Click **OK**.

Terminating a Meeting

You can terminate a meeting at any time.

Procedure

- On the toolbar, click the **Terminate Meeting** button.
  The meeting is immediately terminated.

Defining Video Layout and Display

The **Video Layout and Display** area allows meeting controllers to spontaneously control and adjust all aspects of meeting video. When first accessed, this area displays the video layout as selected during meeting scheduling. From this view, the meeting controller can do the following:

- In **Continuous Presence Mode**, you can view which terminals are set for which video frames.
- View a list of scheduled attendees per terminal by placing the mouse over a video frame (frames set to auto-switch will not display names).
- Rearrange the video layout per terminal by clicking and dragging terminal names from the Control Panel terminal list to the desired frame.
- Set voice activated sub-frames.

Defining the Video Output Schemes

When enabled, the video output schemes displays up to four available video layouts. The iCM can produce up to four different video layouts per meeting to cater for participants with different video support capabilities, or different viewing purposes.

Multiple meeting views are configured per service with settings that specify video layout, layout switching and participant layout switching behavior, picture resolution, bandwidth settings, frame rate and video format.

Multiple meeting views enable the speaker in a lecture to view the participants while the participants view the speaker. In a meeting with varying connection speeds, participants with high video capabilities and participants with low video capabilities can take part at the same time without one affecting the experience of the other.

Note This is available with MVP support only.

☞ **Procedure**

1. In the **Video Display** area, click the **Output Scheme Settings** button. The **Video Scheme Settings** dialog box displays.
2. In the **Bandwidth** column, enter the bandwidth for each video scheme.
3. Click **OK**.

Activating and Deactivating Auto-Switching

Auto-switching mode displays all the participants of a large meeting on a rotating basis when **Continuous Presence** mode is selected in the video layout. Participant images can be replaced at preset intervals either in batches or one by one by way of a queue system.

You can activate or deactivate auto-switching at any time.

Note Auto-switching overrides any existing video display options.

☞ **Procedure**

1. In the **Video Display** area, click the **Auto-switch** button.

   The **Auto-switch interval** screen appears.
2. In the relevant field, enter an auto-switching interval value, between 10 and 108 000 seconds (30 minutes).
3. Click **OK**.

   Video from participating terminals (randomly selected) appears on all other terminals at the defined interval.

Note To disable auto-switching, click the **Auto-switch** button.

Displaying a Participant or Terminal Name

You can display a participant or endpoint (terminal) name in a specific position within the video layout frame.

Note iCM supports text overlay on participant images when there is MVP support and the text overlay option is configured for the meeting type.

Procedure

- In the **Video Display** area, click the **Display Participant Name in Frame** button.

  Each participant or endpoint is clearly identified by name, in a text overlay on the video image. The image of the active speaker is indicated by a border.

Setting a Voice-Activated Frame

You can set a voice-activated frame.

Note This is available only for views for which a sub-frame is configured.

Procedure

- In the **Video Display** area, drag the **Active Speaker** button into the required position within the video layout frame.

Enabling/Disabling Dynamic Layout

With a dynamic layout, you can switch between a wide range of video layouts for the meeting. With dynamic layout, the video image automatically includes the number of frames equal to the number of participant images (up to a maximum of 16). The layout changes according to the number of participants that join or exit the meeting.

Dynamic layout conserves bandwidth, eliminates the display of empty frames in the video image, and makes optimal use of the video image display. Dynamic layout is especially suited to a meeting that has a high rate of participant traffic joining and exiting the meeting, or to an adaptive meeting type that has a variety of meeting sizes.

Note Dynamic layout is only available with MVP support.

☞ **Procedure**

1. To enable a dynamic layout, in the **Video Display** area, click the **Dynamic Layout** button.
2. To disable the dynamic layout, click the **Dynamic Layout** button again.

Note When **Dynamic Layout** is selected, **Change Layout** is disabled.

Changing the Layout

The iCM supports drag and drop control in the meeting control interface for positioning participant images in the layout during a meeting and in advanced invitations when selecting participants to join predefined meetings.

☞ **Procedure**

1. In the **Video Display** area, click the **Change Layout** button. The **Select Layout** screen displays.
2. Select the layout from the options in the **Select Layout** screen, and then drag and drop the option in the selected layout area in the **Video Display** area.

Inviting Participants

If you have the appropriate privileges, you can invite multiple participants simultaneously to join the meeting using the Web interface.

☞ **Procedure**

1. On the **Invite** tab, from the in the **Video Layout** area, from the list select the type of terminal you want to invite. The following options are available
   - IP (H.232)
   - IP (SIP)
   - PSTN/ISDN (H.320)
   - Mobile
2. To enable dial-in terminals to connect to the meeting, select the **Dial-in** check box.

3. In the **Number/Alias** field, enter a unique alias for the participant.
4. In the **Display Name** field, type the participant name to be displayed on the video screen.
5. In the **Bandwidth** field, select the appropriate video bandwidth rate from the drop-down list.
6. To position participants in the layout before a meeting, drag the **Pre Position** icon to the required position in the **Video Display** area.
7. Click the **Invite** button.

   The participant is invited to the meeting. When the participant joins the meeting, the selected video layout is pre-selected.

Using the Participant List Tab

The **Participant List** tab enables you to view meeting participant details including media connection types and available video layouts for the meeting. You can view the details in an alphabetical list or according to cascaded connections.

Users with chair-control have permission to perform the following actions

- Invite participants
- Modify participant media connections
- Manually reposition participant images in a video layout
- Modify meeting view layouts
- Specify the position of a voice-activated image in the meeting view
- Create sub-conferences
- View additional participant details

On the **Participant List** tab, all participants currently invited to a meeting are listed. The following information about each participant or terminal is included

- **Status**—Participant status. To sort by status, click the column heading.
  - Orange status indicates the participant is connecting.
  - Green status indicates that the participant is connected.

- Red—Participant is disconnected. Disconnected participants remain in the **Participant List** for the duration of the meeting.
  To reconnect a disconnected participant, click the red status icon.
- No status indicator indicates that there are no meeting participants.

- **Name**—Displays the participant name
- **Number**—Displays the endpoint number of the meeting participant
- **Sub-conf.**—To divert selected participants in the current meeting to a new meeting or to a private audio meeting that is currently in progress. This option only appears when sub-conferences are in progress during a meeting. For more information, refer to Inviting a Sub-conference on page 35.
- **Location in View**—Indicates the meeting view being used for a current participant. When a meeting is configured with more than one view, select from the list of available views to modify a view for the selected participant.
- **Media Icons**—Indicate participant equipment and capacities, such as microphone, loudspeaker, monitor, camera, and data collaboration. The icons are enabled for users with chair-control permission related to the media type status for a selected participant. For more information, see Controlling Media Status on page 42.

Controlling Media Status

If you have chair-control access for controlling the media type status, you can enable or disable the media capabilities of selected users, as described in the following sections.

Muting or Enabling a Selected Microphone

This option is useful in cases when there is unwanted background noise related to a specific participant or terminal.

Procedure

- To mute or enable audio for a selected participant, click the **Mic. Enabled** icon next to the participant name.

Muting or Enabling a Selected Loudspeaker

You can enable or disable a specific participant loudspeaker.

Procedure

- To mute or disable a specific loudspeaker, click the **Loudspeaker Enabled** icon next to a participant name.

Enabling a Selected Monitor

You can enable a selected monitor.

Procedure

- Click the **Monitor Enabled** icon next to a participant name.

  The monitor is enabled for use during the meeting.

Blocking a Selected Camera

You can block or unblock a video stream sent by a meeting participant. For example, if a participant's video connection affects meeting processing and degrades performance, you can block the participant's video connection until endpoint issues are resolved.

Procedure

- To enable a participant's use of a camera, click the **Camera Enabled** icon next to a participant name.

Enabling Data Collaboration

You can enable data collaboration if the participant's terminal supports T.120 data sharing.

Procedure

- To enable data collaboration, click the **Data Collaboration Enabled** icon next to a participant name.

Using the Statistics Tab

The **Statistics** tab provides a comprehensive set of statistical information about bandwidth usage and audio/video packet behavior. Statistics are frequently updated automatically to enable effective monitoring of meeting performance. The following table details the elements on the **Statistics** tab. Information on the **Statistics** tab is read-only.

Using the Advanced Invitation Tab

The **Advanced Invitation** tab enables you to invite multiple participants into a meeting at the same time. Each invite entry box may also contain multiple participant numbers using separators. This greatly extends the number of participants you can invite at the same time. You can also select a lower bandwidth rate with which to connect individual participants.

Advanced settings allow you to drag and drop participant images into preferred positions in the layout of each meeting view supported in the meeting, and to specify the layout which invited participants see when joining a meeting.

The following sub-tabs are available in the **Advanced Invitation** tab

- **User**—Enables you to simultaneously invite multiple participants to a meeting.
- **Terminal**—Enables you to simultaneously invite multiple terminals to a meeting.

Inviting Multiple Participants to a Meeting

You can invite multiple participants to a meeting, simultaneously.

☞ **Procedure**

1. In the **Advanced Invitation** tab, click the **User** sub-tab.
2. Select the attendees to invite from the **Users: in Groups** drop-down list. If required you can search for users by entering the full name or part thereof in the search field, and clicking the search icon.
3. Click the right arrow to include these users in the list to be invited.
4. In the **Kbps** field, select the bit rate to be used when inviting a participant to a meeting. Use the default setting for optimal bit rate performance.
5. If required, click **Advanced** and then select a layout option from the **view** list. Your selection presets the position of the

invited participant image in the video layout upon the participant's entry into the meeting.

6 Drag the **Lock Image** icon into the preferred position in the **Layout Display Frame** displayed on the right side of the **Advanced Invitation** tab.

Note You can specify a position for the participant image in all layouts currently supported in the meeting.

7 Click **Invite** to send the invitation.

Inviting Multiple Terminals to a Meeting

You can invite multiple terminals to a meeting, simultaneously.

Procedure

1 On the **Advanced Invitation** tab, click the **Terminal** sub-tab.

2 Select the terminals to include in the meeting. If required you can search for terminals by entering the full name or part thereof in the search field, and clicking the search icon.

3 To include the selected terminals in the list of invited terminals, click the right-pointing arrow.

4 In the **Kbps** field, select the bit rate to be used when inviting a terminal to a meeting.

Note Use the default setting for optimal bit rate performance.

5 If required, click **Advanced** and then select a layout option from the **view** list. This presets the position of the invited terminal image in the video layout, upon entry of a participant into the meeting.

6 Drag the **Lock Image** icon into the preferred position in the **Layout Display Frame** located on the right side of the **Advanced Invitation** tab.

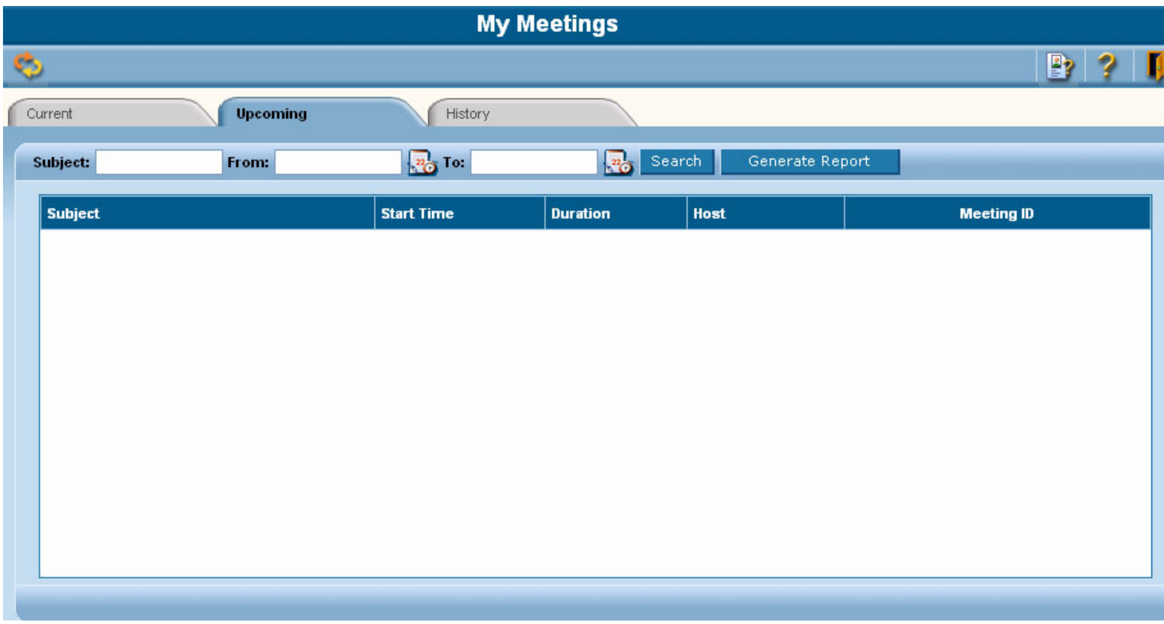
Note You can specify a position for the participant image in all layouts currently supported in the meeting.

7 To send the invitation, click **Invite**.

Using the Upcoming Tab

The **Upcoming** tab lists all the upcoming video meetings for the entire organization.

Figure 5-3 My Meetings: Upcoming Tab



Information about each meeting is included under the following column headings

- **Subject**—Displays the subject of the meeting. You can click the subject to modify the meeting, for example, invite additional participants. For more information on the fields displayed, refer to Scheduling Meetings on page 7.
- **Start Time**—Displays the date and time the meeting is scheduled to start.
- **Duration**—Displays the meeting length, in minutes.
- **Host**—Displays the name of the person who is specified as the host of the meeting. The host is selected from the **Host** drop-down list in the **Attendees Settings** tab in the **Schedule A New Meeting** section.

- **Meeting ID**—Displays the unique identifier for the meeting.

Note You can sort a column by clicking the column header.

Searching for a Meeting

You can search for an upcoming meeting at any time.

Procedure

1. In the **Subject** field, enter the subject or partial subject of the meeting for which you are searching.
2. **In the E164** field, enter an E164 number for an IP terminal. Any participating IP terminal with that number is listed in the search results.
3. By the **From** field**,** click the Calendar button and in the screen that opens, select the start date from which meeting information is searched.
4. By the **To** field**,** click the Calendar button and then in the screen that opens, select a finish date up to which meeting information is searched.
5. Click **Search**.

   The meeting is highlighted.

Generating Reports

You can generate a report in .xls format, that shows all the upcoming meetings scheduled between selected dates. Once you have saved the report, you can view it using Microsoft Excel.

Procedure

1. In the **Upcoming** tab, in the **From** and **To** fields, click the calendar icons to select a start and end period from the popup calendar within which to generate the report.
2. Click **Generate Report**. Information about each meeting is included in the report. For details, see Generated Report Information Categories on page 49.
3. To save the report, click **Save**.

   In the dialog box that opens, browse to the location in which you want to save the file, enter the file name and type, and then click **Save**.

Generated Report Information Categories

The following is a list of the information categories that are included in a generated report.

Note A report generated from the **History** tab includes the same information categories.

- **Virtual Meeting ID**
- **Master Meeting ID**
- **Slave Meeting ID**
- **iView Communications Manager Meeting ID**
- **Subject**
- **Meeting Type**
- **Reference Code**
- **Start Time**
- **Duration**
- **Meeting Room**
- **Organizer Name**
- **Service Prefix**

- **Services**
- **MCU Name(s)**
- **Terminals**
- **Number of Extra IP Ports Reserved**
- **Number of Extra ISDN Ports Reserved**
- **Dial-in IP Terminals**
- **Dial-out IP Terminals**
- **Dial-in ISDN Terminals**
- **Dial-out ISDN Terminals**
- **Gateway List**
- **Device Failure Cause (Device Name, IP Failure, Cause)**
- **Attendee Failure Cause (Name, Number, ISDN, Dial-in, Total Time, Failing Attempts, Last Failure Cause)**

Modifying Meetings

You can modify an upcoming meeting at any time.

☞ **Procedure**

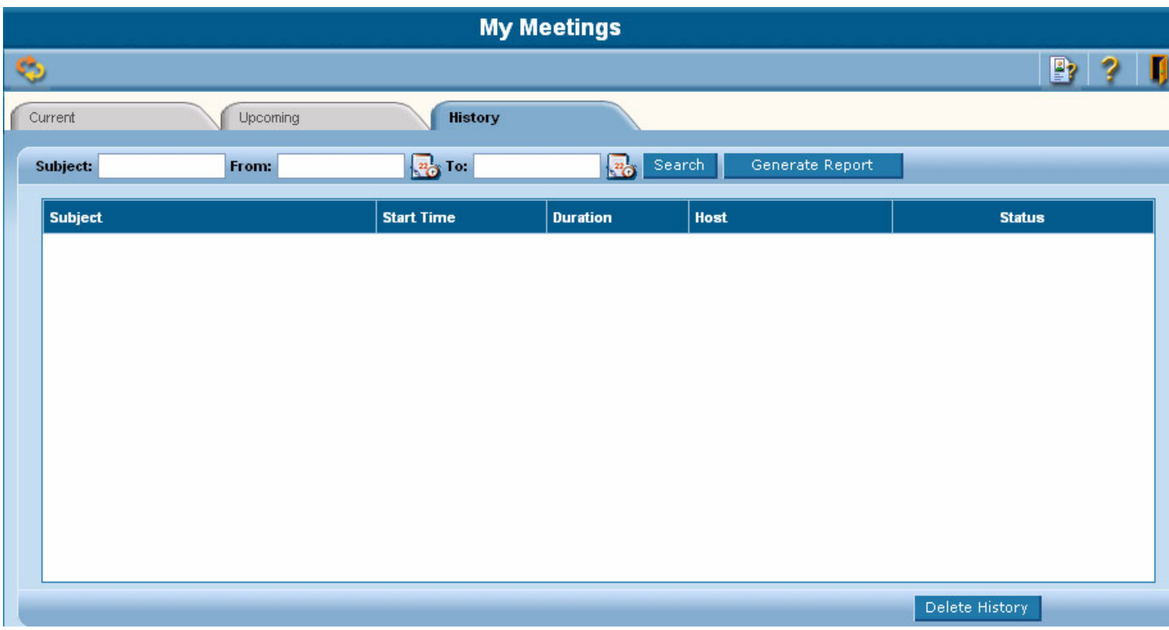
1. On the **Upcoming** tab, click the **Subject** of the meeting you want to modify.

   The **Modify Meeting** screen appears.
2. Enter information according to your requirements.

Using the History Tab

On the **History** tab, you can view past meetings of a specified user or organization. You can also search for meetings. A list of all past meetings is displayed.

Figure 5-4 *My Meetings: History tab*



Information about each meeting is included under the following column headings

- **Subject**– **Subject of the meeting.** To sort by subject, click column heading.
- **Deployment**–Deployment in which the meeting was scheduled.
- **Start Time**—Meeting date and start time. To sort by start time, click column heading.
- **Duration**—Length of the meeting, in minutes. To sort by meeting duration, click column heading.
- **Host**—Name of the designated host of the meeting. To sort by host name, click column heading.

- **Status**—Meeting termination status. To sort by failure status, click **Status** column heading.
  - Green status indicates successful meeting termination and all participants successfully exited the meeting.
  - Red status indicates unsuccessful meeting termination or the abnormal exiting of a terminal from the meeting.

    To view the **Reason Failed** error message, click the red status indicator.

Note If a terminal is disconnected correctly via iCM in-meeting control, no red status indicator appears on the **History** tab details. For details, see Terminating a Meeting on page 37.

  - No status indicator indicates that there are no designated meeting participants.

Searching For a Meeting

On the **History** tab, you can search for a past meeting.

Procedure

1. In the **Subject** field, enter the subject or partial subject of the meeting for which you are searching.
2. **In the E164** field, enter an E164 number for an IP terminal. Any participating IP terminal with that number is listed in the search results.
3. By the **From** field**,** click the Calendar button and in the screen that opens, select the start date from which meeting information is searched.
4. By the **To** field**,** click the Calendar button and then in the screen that opens, select a finish date up to which meeting information is searched.

5. Click **Search**.

   Search results are listed.

Generating Reports

You can generate a report, in .xls format, that shows all past meetings scheduled between selected dates. Once you have saved the report, you can view it using Microsoft Excel.

Procedure

1. In the **History** tab, in the **From** and **To** fields, click the calendar icons to select a start and end period from the popup calendar within which to generate the report.
2. Click **Generate Report**.
3. To save the report, click **Save**.

   In the dialog box that appears, browse to the location in which you want to save the file, enter the file name and type, and then click **Save**.

Generated Report Information Categories

For details about information categories that appear in a generated report, see Generated Report Information Categories on page 49.

Note A report generated from the **Upcoming** tab includes the same information categories.

Viewing Past Meeting Details

You can view the details of the past meetings at any time.

Procedure

- On the **History** tab, click the **Subject** of the meeting you want to view.

  The **Meeting Details** screen appears. Each tab on the **Meeting Details** screen displays settings configured for all past meetings.

Deleting Meeting History

You can delete meetings from the **History** tab at any time.

Procedure

- In the **History** tab, click **Delete History**.

  All past meetings are deleted from the **History** tab.

Note Deleted meetings appear in billing and reporting statements.

Note **History** tab search results do not include deleted meetings.

Defining Duration of Meeting History Display

The length of time meeting history remains on the **History** tab is defined in the **My Preferences** section. For details, see Changing Your Preferences on page 68.

6

ADDRESS BOOK

This section describes how to use the **Address Book** screens.

OVERVIEW OF THE ADDRESS BOOK

All your personal and public contacts, and the groups to which these contacts belong, are contained in the address book. The **Address Book** section includes the following tabs

- **Private**–Lists all of your personal contacts
- **Public**–Lists all of your public contacts
- **My Groups**–Lists all of your group contacts

Using the Private Tab

The **Private** tab lists your personal contacts. On the **Private** tab, the following information is displayed

- **Name**—Contact’s name
- **Terminal**—Contact’s terminal
- **E-mail**—Contact’s e-mail address
- **Group**—Group to which the contact belongs
- On the status bar, the current number of personal contacts and the maximum number of personal contacts allowed by the administrator are displayed

Note To sort column contents, click the column header.

Searching for a Contact

You can search for a contact within all groups in your organization.

☞ **Procedure**

1. In the **Address Book** screen, click the **Private tab.**
2. In the **Name** field, enter the full or partial name of a contact.
3. From the **In Groups** list, select **All Groups** or a group in which to search for the contact.
4. Click **Search**.

   Search results are listed on the **Private** tab.

Adding a Contact

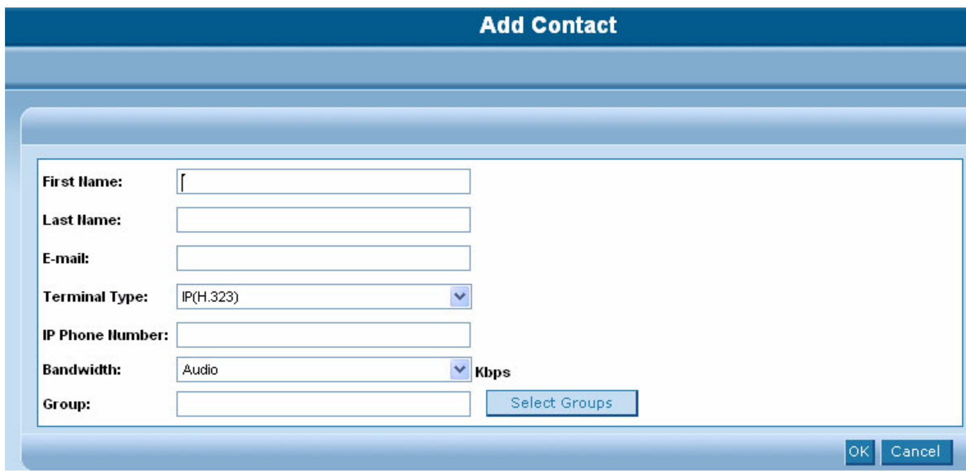
Note Different entries cannot include the same first name, last name, e-mail address, or phone number.

Procedure

1. On the **Private** tab, click **Add**.

   The **Add Contact** screen appears.

Figure 6-1 Private tab|Add Contact



2. In the **First Name** field, enter the new contact's first name.
3. In the **Last Name** field, enter the new contact's surname.
4. In the **E-mail** field, enter the new contact's e-mail address.

Note If you provide a phone number for the contact, inclusion of an e-mail address in the **E-mail** field is not mandatory.

5. From the **Terminal Type** list, select a terminal type used by the contact.

   Fields and options are active depending on the terminal type you select.

6 If you select the terminal type **IP (H.323)**, provide the following information

- **EIP Phone Number**–Enter the E.164 number of the new terminal.
- **Bandwidth**–From the list, select the maximum speed for the terminal's video meeting connection to the network.

7 If you select the terminal type **PSTN/ISDN**, **provide the following information**

- **ISDN Phone Number**
  - **Country Code**–Enter the international access code for the ISDN terminal.
  - **Area Code–E**nter the local area code of the ISDN terminal. If the local area code begins with 0, do not include the 0 in the area code.

    Number–Enter an ISDN phone number.
- **Bandwidth**–From the list, select the maximum bandwidth for the terminal's connection to the network for video meetings.
- **Restricted Mode**–Check the **Restricted Mode** check box to apply Restricted Mode (the convention of using multiples of 56 Kbps instead of multiples of 64 Kbps).

8 If you select the terminal type **Dual (H.320 and H.323)**, provide the following information

- **IP Phone Number**–Enter the E.164 number of the new terminal.
- **ISDN Phone Number**
  - **Country Code**–Enter the international access code of the ISDN terminal.
  - **Area Code**–Enter the local area code of the ISDN terminal. If the local area code begins with 0, do not include the 0 in the area code.
  - **Number**–Enter the ISDN phone number.
- **IP Bandwidth**–From the list, select the maximum bandwidth for the IP terminal's connection to the network for video meetings.

- **ISDN Bandwidth–From the list,** select the maximum bandwidth of the ISDN terminal's connection to the network for video meetings.
- **Restricted Mode**–Check the **Restricted Mode** check box to apply Restricted Mode (the convention of using multiples of 56 Kbps instead of multiples of 64 Kbps).

9 If you selected **IP (SIP)**, provide the following information
- **SIP URI**–Enter an SIP URI for the user.
- **Bandwidth**–From the list, select the maximum bandwidth of the terminal's connection to the network for video meetings.

10 To associate a contact with a group, in the **Group** field, enter the name of a group.

11 If you want to select from a list of existing groups, click the **Select Groups button.**

12 **On the Select Groups screen,** from the **Available Groups** list, select a group(s) and then click the right-pointing arrow to include the group(s) in the **Selected Groups** list.

13 To remove a group from the **Selected Groups** lists, select the group(s) from the list and then click the left-pointing arrow.

14 To close the **Select Groups** screen, click **OK**.

15 The contact appears in the relevant **Group** list and is added to your personal address book.

Modifying a Contact

You can modify the details of the contacts in your personal address book at any time.

☞ **Procedure**

1. **On the Private** tab, in the **Name** column, click on a contact name.

   The **Modify Contact** screen appears.
2. Modify the relevant settings.
3. Click **OK**.

Deleting a Contact

You can delete contacts from your personal address book at any time.

Procedure

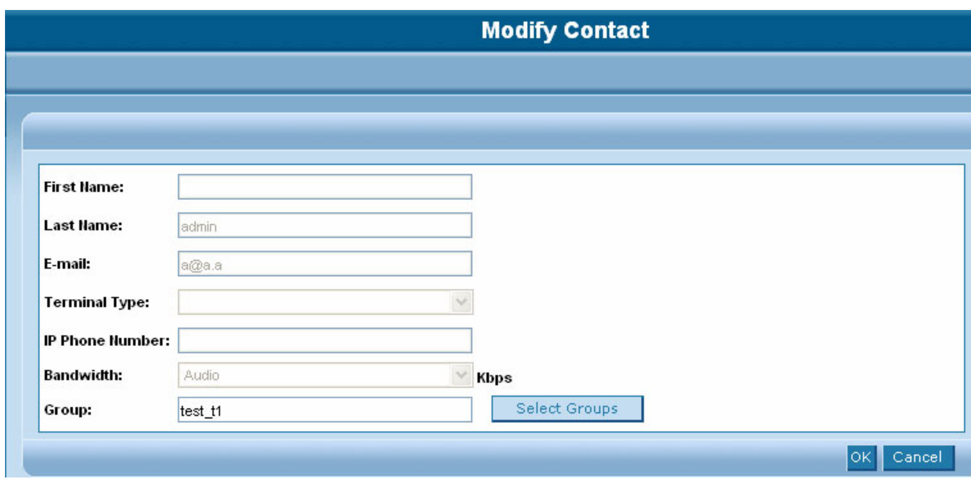
1. On the **Private** tab, in the **Name** column, select the check box next to the name of the contact you want to delete.
2. Click **Delete**.

   The contact is permanently deleted from your address book.

Using the Public Tab

The **Public** tab lists all the public contacts in your organization.

Figure 6-2 *Public tab|Modify Contact*



On the **Public** tab, the following information is displayed

- **Name**—Contact's name
- **Terminal**—Contact's terminal
- **E-mail**—Contact's e-mail address
- **Group**—Group to which the contact belongs

- On the status bar, the current number of public contacts and the maximum number of public contacts allowed by the administrator are displayed

Note To sort column contents, click the column header.

Searching for a Public Contact

You can search for a public contact from within all the groups in your organization.

Procedure

1. On the **Public** tab, in the **Name** field, enter the full or partial name of a contact.
2. In the **In Groups** field, from the list, select **All Groups** or a specific group in which to search for the contact.
3. Click **Search**.

   Search results appear on the **Public** tab.

Adding a Public Contact to Your Personal Address Book

You can add a public contact to your personal address book.

Procedure

1. On the **Public** tab, in the **Name** column, select the check box next to the name of the contact you want to add to your personal address book.
2. Click **Add to Private**.

   The **Private** tab opens and the contact appears in the list.

Using the My Groups Tab

The **My Groups** tab lists all your group contacts. The following information is provided

- **Group Name**–Name of the group.

- On the status bar, the current number of groups and the maximum number of groups allowed per user as defined by the administrator.

Searching for a Group

You can search for a group at any time.

Procedure

1. On the **My Groups** tab, in the **Name** field, enter the full or partial name of a group.
2. Click **Search**.

   The search results appear on the **My Groups** tab.

Adding a New Group

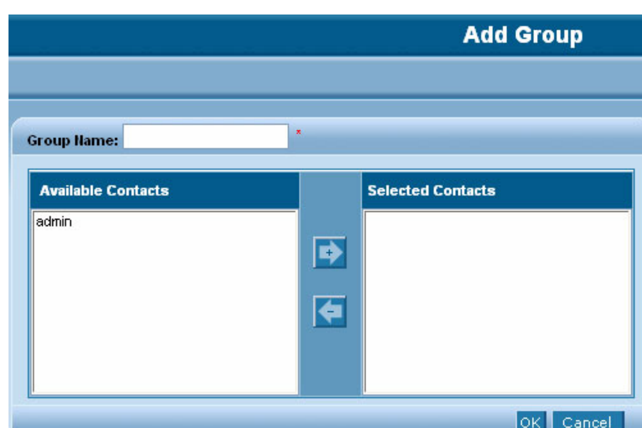
You can add a new group at any time.

Procedure

1. On the **My Groups** tab, click **Add**.

   The **Add Group** screen appears.

   Figure 6-3 *My Groups: Add Group screen*

2. In the **Group Name** field, enter the name of the new group.

3. From the **Available Contacts** list, select the contact(s) that you want to include in the group, and then click the right-pointing arrow to include them in the **Selected Contacts** list.
4. Click **OK**.

   The new group appears in the **My Groups** screen. All selected contacts are included in the group. On the **Private** and **Public** tabs, the **My Groups** list includes the new group.

Modifying a Group

You can add or remove group contacts at any time.

Procedure

1. In the **Group Name** column of the **My Groups** tab, click the entry you wish to modify.

   The **Modify Group** screen appears.
2. Add or remove contacts from the group by moving them to or from the **Available Contacts** list to the **Selected Contacts** list, as you require.
3. Click **OK**.

   The contacts in the group are modified.

Deleting a Group

You can delete contact groups at any time.

Procedure

- On the **My Groups** tab, in the **Name** column, select the check box next to the name of the group you want to delete, then click **Delete**.

  The group is permanently deleted from your address book.

7

My Profile

Overview of the My Profile Section

The **My Profile** section displays profiles which include details such as security credentials, service access, the default time-zone, and the default terminal settings.

The **My Profile** section contains the following tabs

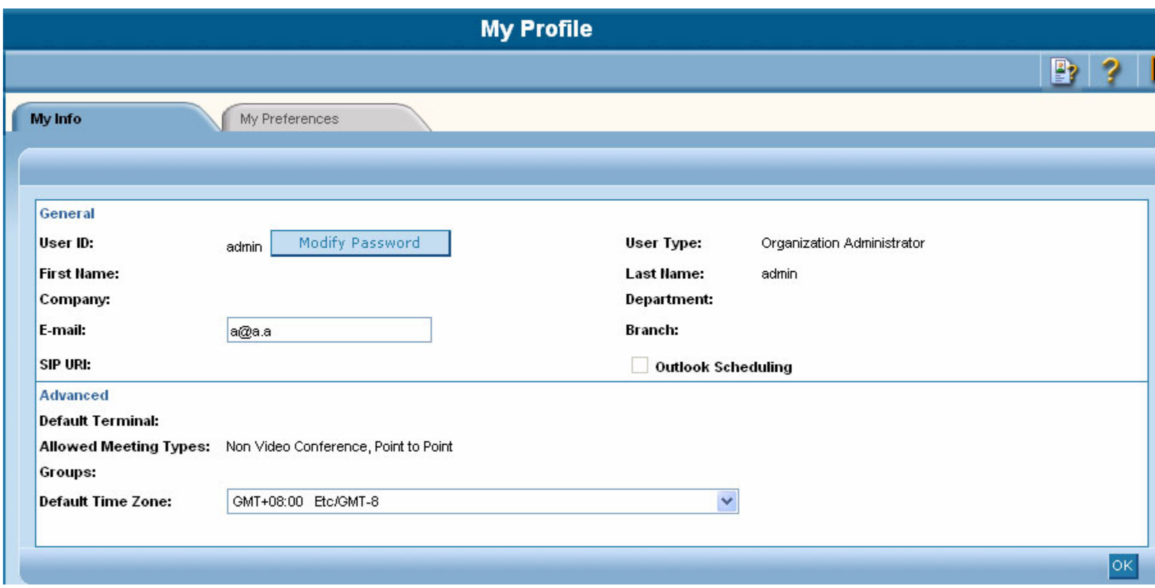
- **My Info–**Displays your user profile settings. For details, see Using the My Info Tab on page 66.
- **My Preferences**–Displays your user profile meeting-related and browser-related settings. For details, see Using the My Preferences Tab on page 68.

USING THE MY INFO TAB

The **My Info** tab displays your profile settings. You can modify some profile settings on the **My Info** tab.

Note If the profile settings are stored on an external directory server, you cannot modify them.

Figure 7-1 *My Profile:My Info tab*



On the **My Info** tab, in the **General** section, the following information is displayed automatically according to information in your profile

- User ID
- User Type
- First Name
- Last Name
- Company
- Department
- E-mail
- Branch

- SIP URI–ISDN, H.232, or SIP telephone information is displayed. You can modify the number as required.

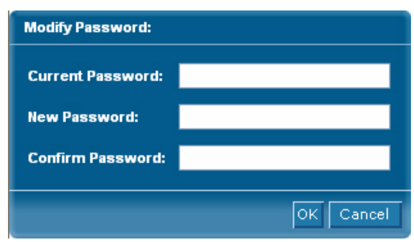
In the **Advanced** section, the following information is automatically displayed according to parameters defined by the administrator

- Default Terminal
- Allowed Meeting Types
- Groups
- Default Time Zone

Modifying Your Password

1 On the **My Info** tab, next to the **User Name ID** field, click the **Modify Password** button.

Figure 7-2 Modify Password screen



2 Complete the information as required.

3 Click **OK**.

The **Modify Password** screen closes and the **My Info** tab is displayed.

Modifying Your E-mail Address

Procedure

1 On the **My Info** tab, in the **E-mail** field, modify your e-mail address as required.

2 Click **OK** to save the change.

Changing Your Default Time Zone

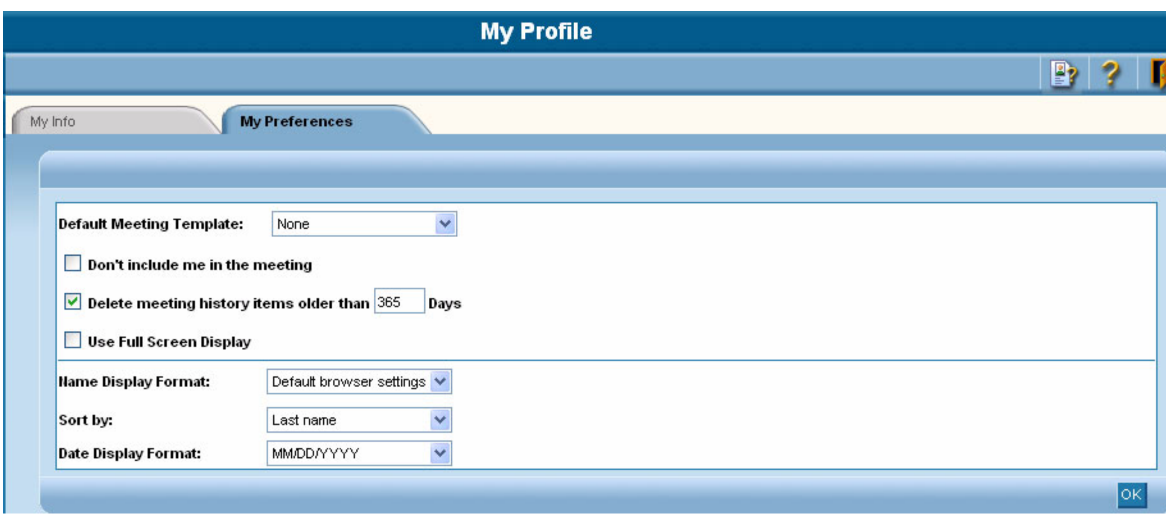
Procedure

1. On the **My Info** tab, from the **Default Time Zone** list, select a time zone.
2. Click **OK** to save the selection.

Using the My Preferences Tab

The **My Preferences** tab displays preferences settings. You can modify some meeting and browser related settings.

Figure 7-3 My Profile: My Preferences tab



On the **My Preferences** tab, information is displayed automatically according to default settings determined by the administrator.

Changing Your Preferences

On the **My Preferences** tab, you can change some default settings defined by the administrator. These settings relate to meetings and the browser.

Procedure

1. To change the **Default Meeting Template**, select from the list of available meeting types. The list is defined by the administrator.
2. If you do not want to be automatically included in the **Selected Participants** list when you create a new meeting template or meeting.
3. If you want to delete meetings from the **My Meetings** section, on the **History** tab (and from the database), after a specified number of days, check the **Delete meeting history items older than *n* days** check box.
4. If you want to change the number of days meeting history remains in the **My Meetings** section, on the **History** tab (and in the database), enter a new value in the **Delete meeting history items older than *n* days** field.
5. If you want meetings displayed full screen, check the **Use Full Screen Display** check box. The meeting is displayed without a menu and title bar in your browser. **Use Full Screen Display** is checked by default. If you uncheck the **Use Full Screen Display** check box, the default browser settings are used for the display.
6. To change the display of your name (for example, to your last name before your first name) in meeting related information and in the meeting video display, from the **Name Display Format** list, select an option.
7. To change the sort order for participant **Name** columns in the **User** interface, from the **Sort by** list, select **Last name** or **First name**.
8. To change the display format of dates in the User interface, from the **Date Display Format** list, select a format (for example, **DD/MM/YY**)
9. When you have completed your selections and entries on the tab, click **OK** to save and apply the changes.
10. Select the **Use Full Screen Display** check box to display only a window frame without a menu or title bar in your browser. By default, this option is selected. If you uncheck this check box, the regular browser displays.

11 In the **Name Display Format** field, from the list select a name format from the list (according to the default browser settings, first name first, or last name first).

12 In the **Sort by** field, select whether to sort according to last name or first name.

13 In the **Date Display Format** field, select the order in which the day, month and year should be displayed.

14 Click **OK**.

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